RIT

Oracle Manager Self-Service Manual Revised 2/12/14

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Unauthorized use of any of these reports or data within Oracle is prohibited. Please refer to the RIT Acceptable use Guidelines at http://resnet.rit.edu/guide/pages/acceptableUse.php

How to Access Oracle

This section contains complete information about how to access the Oracle Self Service and the Oracle Financial Applications.

How to Access Your Oracle Home Page:

From an On-Campus Location

1. You will need an Ethernet connection to access the RIT network.
2. Using your Internet browser, go to the URL **https://mybiz.rit.edu**
3. If you are using a Macintosh computer, the only supported browser is Safari. Individuals using unsupported browsers may be able to log on, however, the browser may not interact properly.
4. The URL in step #1 will take you to the RIT Oracle Applications Sign-On Page. Enter your Oracle User ID and password and click on the "Login" button. This will take you to your Oracle home page.

From an Off-Campus Location

Note: VPN connection is required to access http://mybiz.rit.edu

1. There are two methods to access the RIT Network from off-campus:
    a. An RIT User Account using your userid and password with a modem.
    b. The Virtual Private Network (VPN) with an ISP such as Roadrunner or Frontiernet.

2. To use either method, you'll need an RIT Computer account. If you already have a computer account, you do not need another to access Oracle from off-campus. If you do not have an RIT user account, complete an ITS Computer Account Request form and submit it to the ITS Help Desk. This form is available on the web at http://www.rit.edu/its/help/forms/its-acct-req.pdf

3. To obtain RIT DialIP service instructions, visit the DialIP web page at: http://www.rit.edu/its/services/tele/dialip.html

4. VPN is used to secure transmissions across the Internet. Using VPN technology makes your home/remote computer appear as if it is attached directly to the RIT network, even if you are using an outside ISP such as Road Runner, DSL, or AOL. To obtain the Virtual Private Network service instructions, visit the VPN web page at http://www.rit.edu/its/services/vpn/

5. Once you have downloaded and logged in to VPN, access an Internet browser and go to URL https://mybiz.rit.edu

If you receive the error, "Cannot find server or DNS Error" while attempting to sign-on, you are not being authenticated through RIT's DCE Security. You may need to obtain an RIT Computer Account (see #2). If you already have an RIT computer account, contact the ITS Help Desk for assistance at 475-HELP.

6. The Oracle Application's sign-on page will display. Enter your Oracle User ID and password and click on the "Login" button. This will take you to your Oracle home page. Your Oracle User ID and password may be different from your RIT Computer Account login.

How to Use the Oracle Manager Self Service Applications

After you have logged into your Oracle Home Page, you will see a number of "responsibilities" listed. Examples are:

- Your Department Manager Self Service (e.g. RIT MSS NTID Manager Self Service) or
- RIT Supervisor Self-Service

After double clicking on your responsibility, you will see your sub functions as discussed below.

Personal Information

Upon entering, you should immediately see your direct reports. You have access to your direct reports and their subordinates automatically as displayed on the Human Resources Supervisory Organization Chart.
http://www.rit.edu/fa/humanresources/content/university-organizational-charts

Person Search Hints
If you wish to build a list of people in your organization, type the LAST name of the person and click GO located at the top of the page before the Advanced Search Link. Once you see the Search Results, check the box before the desired person's name and ADD TO MY LIST. A Confirmation message will appear.
Hint: You can substitute the wildcard character "%" in any part of the name field. For example, if you are searching for George Smith, you can enter "Geo%" in the first name field and "Sm" in the last name field.
After you have added everyone to your list, you can exit out of this screen using BACK or HOME. Once you go back to the Main Page, whenever you enter the Personal Information View, click on MY LIST. The people in the built list will be present.

NOTE: You must go through the person search process periodically to add new people to your list because they do not appear automatically.

Manager Views/Employment Data/Salary Data/Change Supervisor

You can view employment, salary data, or change an employee's supervisor through this link. To view your list, click MY LIST. If you do not have a list, you can search for a person as follows. In the NAME box, type the LAST name of the person and click GO. Once you see the search results, click on the **Details Icon** to view employment/salary data or click on the **Actions Icon** to make supervisory changes.

Manager Views - To View Employment or Salary Data

Click the Details Icon **for the desired person. You can toggle between the Employment and Salary tabs. Each tab shows the employment or salary history for the selected employee.**

Change Supervisor

The Supervisor field in Oracle controls which subordinates show up under a manager in the Manager Self Service hierarchy. This is also used to create the person hierarchy on the HR web site http://www.rit.edu/fa/humanresources/content/university-organizational-charts

Note: the org chart is updated daily from Oracle.
This field is extremely important for controlling security in the self service application; therefore, it should be kept up to date at all times.

1. To change a person's supervisor, click the **Action Icon** to the right of their name.

    a. You may now enter a new supervisor for the employee. If the employee has direct reports, you can either keep them with their current supervisor or make changes to their supervisor on this screen.

    b. The instructions on the screen state: *The selected worker's direct reports are shown below. To reassign them to a new manager, enter the name of the new manager. Anyone reporting to direct reports will remain unchanged.*

2. You can also add new direct reports to the existing supervisor. The choice of employees comes only from your existing hierarchy. This functionality is useful if you are a manager and would like to structure a re-organization of reporting relationships within your department.

3. Once you have finished making your changes, press the NEXT button at the bottom of the page. You will then see a REVIEW screen so that you can VERIFY the existing structure before submitting through the ON-LINE APPROVAL (Workflow) process.

4. Comments to Approver: This box is used to type an appropriate message to display in the email sent to the approver.

5. Approvers: The final approver is always the submitter's immediate supervisor. Additional approvers can be added in front of the final approver. The final approver cannot be changed or deleted from the list.

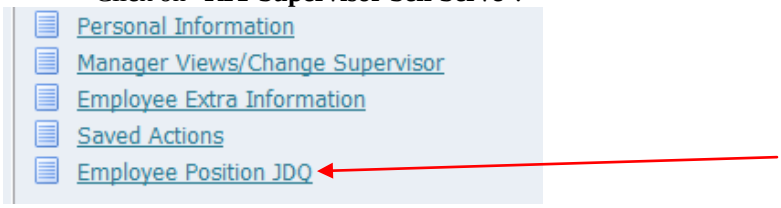
6. People to Notify: Individuals other than those involved in the transaction can be added to this list in order to receive an FYI email notification one the changes have been approved.

Once you submit your changes, they will route to your immediate supervisor for review and approval. Once approved, a notification will go to the new supervisor. The changes WILL NOT be committed to Oracle until the next level supervisor approves the change.

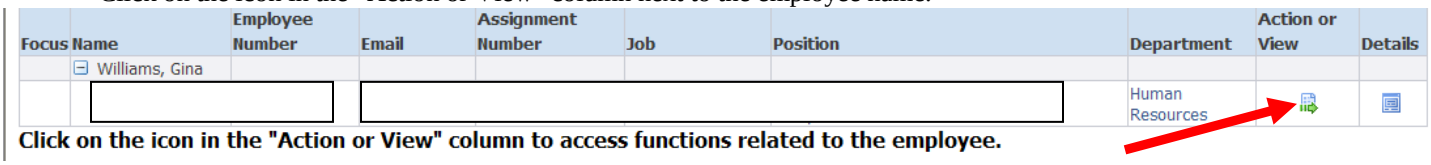
Employee Position Documents-- View or Download (Supervisor Self-Service Only)

A manager or supervisor can view or download a JDQ's attached to their employee's position in Oracle.

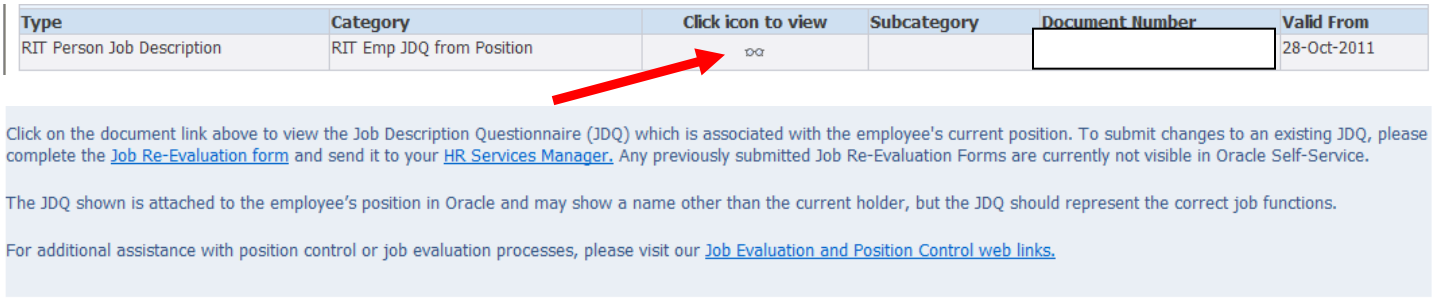
Click on "**RIT Supervisor Self Serve**".



Click on the link for "Employee Position JDQ"
Click on the icon in the "Action or View" column next to the employee name.



Click on the "glasses" icon. This will bring you to a link for the document file.


Type
Category
Click icon to view
Subcategory
Document Number
Valid From
RIT Person Job Description
RIT Emp JDQ from Position
28-Oct-2011
Click on the document link above to view the Job Description Questionnaire (JDQ) which is associated with the employee's current position. To submit changes to an existing JDQ, please complete the Job Re-Evaluation form and send it to your HR Services Manager. Any previously submitted Job Re-Evaluation Forms are currently not visible in Oracle Self-Service.
The JDQ shown is attached to the employee's position in Oracle and may show a name other than the current holder, but the JDQ should represent the correct job functions.
For additional assistance with position control or job evaluation processes, please visit our Job Evaluation and Position Control web links.

IF THERE IS NOT A JDQ SHOWING FOR THE POSITION AND YOU NEED TO SUBMIT A NEW JDQ, USE THE Job Description Questionnaire **FORM. You can also reference:** Job Description Questionnaire (JDQ) instructions

List of Reports

The following reports are available for you to run using the Discoverer Viewer tool. If you click on any of these reports, they should run automatically. Several require date parameters. Please refer to the document entitled "Handy Reference Guide to Manager Self Service Reports" http://finweb.rit.edu/customersupport/forms/managerselfservicereports.pdf for the specific data fields each report contains. Based on your security profile setup, there may be cases where your report does not return data (for example, faculty only reports if your security profile limits you to staff.)

NOTE: For security reasons, **certain reports are only available through Manager Self-Service and are NOT available through RIT Supervisor Self-Serve.**

Adjuncts Per a Certain Period (only available through Manager Self-Service)

Lists all adjuncts being charged to a general ledger number within your organizational hierarchy for the specified period.

- Employee Number
- Full Name
- Element Name
- Amount
- Contract Amount
- Course Number
- Element Effective Start Date
- Element Effective End Date
- Element Costing
- Department Code
- GL Department Name

Costing History

Lists the history of the general ledger account number and percentages to which each employee was charged.

- Employee Number
- Person Name
- Costing Date From
- Costing Date To
- Costing Proportion
- Cost Code
- RIT Department
- RIT Object
- Organization Name

Costing History by Employee

Returns the same data as in the Costing History, but allows you to select a specific employee number.

- Employee Number
- Person Name
- Costing Date From
- Costing Date To
- Costing Proportion
- Cost Code
- RIT Department
- RIT Object
- Organization Name

Current Quarter Adjuncts (only available through Manager Self-Service)

Lists all adjuncts working during the current quarter who are being charged to a general ledger number within your organizational hierarchy

- Employee Number
- Full Name
- Pay Element Name
- Department Code
- GL Department Name
- Course Number
- Element Costing
- Amount
- Contract Amount

Current Assignment and Salary Details

Lists the employee's most current salary and limited position data.

- Organization
- EE (Employee Number)
- Last Name
- First Name
- Adjusted Hire Date
- Salary Change Date
- Salary End Date
- Salary/Pay Rate
- People Group
- Employment Category
- Standard Hours
- Manager Flag
- Weeks (Non-Exempts)
- Months (Exempts)
- Email Address
- Supervisor Name
- Position Name and PC
- Job Category
- Location
- Assignment Status
- College Division
- Effective Date of Rank
- Rank
- Tenure Date
- Assignment FTE
- Tenure Status
- Payroll Name
- Grade
- Grade Min
- Grade Mid
- Grade Max

Emergency Contacts

Lists the contact information as entered by the employee.

- College Division
- Employee Name
- Organization Name
- Primary Contact
- Contact Type
- Contact Full Name
- Contact Phone Number
- Contact Phone Type

- Employee Number

Employee Personal Data

• Lists personal data (e.g. home address) for each employee as reflected in Oracle.

- Organization
- EE (Employee Number)
- First Name
- Last Name
- Address
- City
- County
- State
- Postal Code
- Email Address
- Phone Number
- Phone Type
- Adjusted Hire Date
- College Division

Exempt Assignment Details, Salary and Costing

Lists the general ledger account number, percentages, and calculated amount charged to each employee.

- College Division
- Organization
- Person Name
- Employee Number
- Adjusted Hire Date
- Salary Change Date
- Annual Salary
- Salary * Proportion
- Costing Proportion
- Cost Code
- Costing Date From
- Costing Date To
- RIT Department
- People Group
- Grade
- Grade Min
- Grade Mid
- Grade Max
- Employment Category
- Standard Hours
- Manager Flag
- Weeks (Non-Exempts)
- Months (Exempts)
- Email Address
- Supervisor Name
- Assignment Start Date
- Position Name and PC
- Job Category
- Location
- Assignment Status
- College Division
- Rank
- Tenure Status
- Assignment FTE

- FTE * Proportion
- Listserv Address

Faculty Degree and Rank Info

Lists all degree and school information for faculty as reported in the RIT HR System.

- College Division
- Employee Number
- Full Name
- Assignment Organization Name
- Terminal Degree
- School Name
- Rank
- Position Name
- Job Name
- Location Name
- Tenure Status
- Tenure Date

Faculty Ranks

Lists the most current rank data for each faculty member in your organization.

- Assignment Organization Name
- Employee Number
- Last Name
- First Name
- People Group
- Position Name
- Email Address
- Location Name
- Job Name
- Employment Category
- Rank
- Tenure Date
- College Division
- Tenure Status
- Effective Date of Rank
- Last Update to Rank or Tenure
- Effective Date

Future Dated Salaries

Lists any approved future dated salary changes (employees without future dated salaries will NOT show up on this report.)

- College Division
- Employee Number
- Person Name
- Salary Change Date
- Salary Amount
- Salary Change Reason
- Approved Flag
- Organization Name
- Assignment Start Date
- Assignment End Date
- Position Name
- Job Name

Grad Assistants Current (only available through Manager Self-Service)

Lists any current quarter teaching assistants being charged to a general ledger number within your organizational hierarchy.

- Employee Number
- Full Name
- Element Name
- Amount
- Contract Amount
- Element Effective Start Date
- Element Effective End Date
- Element Costing
- GL Department Name

Grad Assistants Beginning with a Certain Date (only available through Manager Self-Service)

Lists any teaching assistants being charged to a general ledger number within your organizational hierarchy for the specified period.

- Employee Number
- Full Name
- Element Name
- Amount
- Contract Amount
- Element Effective Start Date
- Element Effective End Date
- Element Costing
- GL Department Name

Lump Sum Report (Merit Increases) (only available through Manager Self-Service)

- Employee Number
- Full Name
- Element Effective Start Date
- Element Effective End Date
- Amount
- Organization
- College/Division
- People Group

Non-Exempt Assignment Details, Salary and Costing

Lists the general ledger account number, percentages, and calculated amount charged to each employee.

- College Division
- Organization
- Employee Number
- Person Name
- Adjusted Hire Date
- Salary Change Date
- Pay Rate
- Annual Pay * Costing Percentage
- Costing Proportion
- Cost Code

- Costing Date From
- Costing Date To
- RIT Department
- People Group
- Grade
- Employment Category
- Standard Hours
- Number of Weeks
- Manager Flag
- Months (Exempts)
- Email Address
- Supervisor Name
- Assignment Change Date
- Position Name and PC
- Job Category
- Location
- Assignment Status
- Assignment FTE
- FTE * Proportion
- Internal Address

Open and Filled Positions—(only available through Manager Self-Service.)

Lists all open and filled positions which are within your area of manager self service access.

- College Division
- Employee Number (Emp #)
- Last Name
- First Name
- Full Name
- RIT Position Flexfield
- Organization
- Position Dept
- Assignment Status
- Employee Current Salary
- Position Budget
- Position Control Number
- Position Funding Type
- Assignment FTE
- Position FTE
- Position Title
- People Group
- Job Category
- Assignment Standard Hours
- Assignment Standard Months
- Assignment Standard Weeks
- Temp Position End Date
- Job Code
- EEO Code
- Voting Block

Overload per a Certain Period (only available through Manager Self-Service)

Lists all people with an overload pay element being charged to a general ledger number within your organizational hierarchy during the current quarter.

- Employee Number
- Full Name
- Element Name

- Amount Contract Amount
- Course Number
- Element Effective Start Date
- Element Effective End Date
- Element Costing
- Department Code
- GL Department Name

Position Details

Lists the position and job data for each employee as reflected in Oracle.

- College Division
- Employee Number
- Last Name
- First Name
- Position Name and PC
- Position Title
- Position Number
- Position Funding
- Organization
- Job Category
- Supervisor Name
- Position Department
- Position FTE
- Person(Assignment) FTE

Salary, Costing, and Assignment Details

Lists the general ledger account number and percentages charged plus other assignment and salary data.

- Organization
- Last Name
- First Name
- Employee Number
- Adjusted Hire Date
- Salary Change Date
- Annual Salary
- Costing Proportion
- Cost Code
- Costing Date From
- Costing Date To
- Costing GL Department
- People Group
- Grade
- Employment Category
- Standard Hours
- Manager Flag
- Weeks (Non-Exempts)
- Months (Exempts)
- Email Address
- Supervisor Name
- Position Name and PC
- Job Category
- Location
- Assignment Status
- College Division
- Rank

- Tenure Date
- Assignment FTE
- FTE * Proportion

Salary History Report

Lists salary information going back to 1999 and any future dated salaries.

- College Division
- Organization
- Employee Number
- Person Name
- Position Name
- Job Name
- Grade Name
- Salary Change Date
- Annual Salary

Special Assignment Per a Certain Date

List all people who are receiving a special assignment pay element during a specified period.

- Employee Number
- Full Name
- Element Name
- Element Effective Start Date
- Element Effective End Date
- Input Value Name
- Element Costing
- GI Department Name

Staff Degree Information

Lists all degree and school information for staff and EDF as reported in the RIT HR System.

- College Division
- Employee Number
- Full Name
- Assignment Organization Name
- Terminal Degree
- School Name
- Rank
- Position Name
- Job Name
- Location Name
- Tenure Status
- Tenure Date
- People Group

Summer Salary Per a Certain Date (only available through Manager Self-Service)

Lists all people with a summer salary pay element being charged to a general ledger number within your organizational hierarchy during the current quarter.

- Employee Number
- Full Name
- Element Name
- Amount
- Contract Amount
- Element Effective Start Date
- Element Effective End Date

- Element Costing
- Department Code
- GL Department Name

Export to Excel

These reports are all exportable to Excel. It is preferred to export the report rather than to "print" the report because many of the reports do not print to fit a standard size sheet of paper.

1. In the Actions Box on the left column, select "Export."
2. From the drop-down menu, select "Microsoft Excel Workbook (*.xls)"
3. Click the "Export" button on the right.
4. Click "Click to view or save."
5. You may choose either "Open" or "Save." "Save" is recommended.
6. Choose a file name and a folder where you would like the report saved.
7. Click on "Open" to view the file.
8. Click on "Enable Macros."

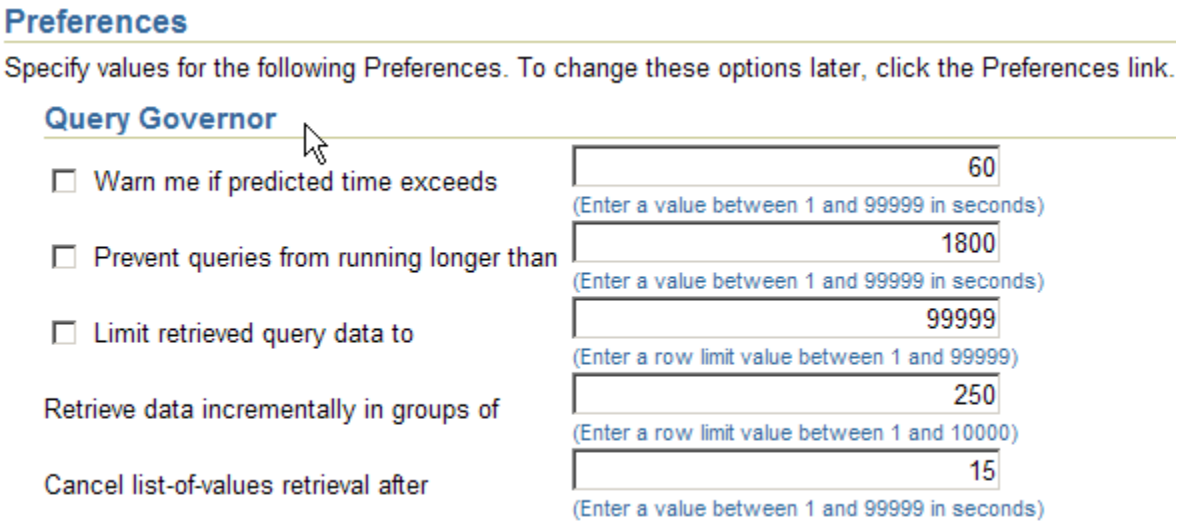
Note: If you are having trouble opening the exported file, check your Excel Macro Security Settings – Tools/Macros/Security. Set to Medium.

Troubleshooting Reports:

If your reports don't appear to be returning all the necessary rows, before calling for assistance, check your report settings by doing the following:

After you run your report, click the PREFERENCES link at the top right hand side of the page.

Make sure that none of the boxes under the Query Governor Section are checked:


Preferences
Specify values for the following Preferences. To change these options later, click the Preferences link.
Query Governor
Warn me if predicted time exceeds
60
(Enter a value between 1 and 99999 in seconds)
Prevent queries from running longer than
1800
(Enter a value between 1 and 99999 in seconds)
Limit retrieved query data to
99999
(Enter a row limit value between 1 and 99999)
Retrieve data incrementally in groups of
250
(Enter a row limit value between 1 and 10000)
Cancel list-of-values retrieval after
15
(Enter a value between 1 and 99999 in seconds)

Leave all other settings as they have defaulted

Click the APPLY button and re-run your query.

If your reports are still not returning the data you expect, or if you are still having trouble, please contact Customer Support at 475-4905. There may be an issue with your security profile setup or your data as shown in the Organizational Hierarchies at http://www.rit.edu/fa/humanresources/content/university-organizational-charts. Select the "Supervisory" Org Chart option to see the person reporting relationships.